

## PHASE 1 – PREPARATION WORKSHEET

The following questions can be used in a department, division, or workforce team discussion to analyze strategic planning, business goals, and priorities over the next 3 – 5 years.

**1. Define our department mission.** (Why do we exist?)

**2. What strategic changes have been made in our Department/Division in the past 5 years?** (Are they working? Do we need to reexamine them?)

**3. What are our Department/Division goals/priorities in the next 5 years?** (Big-picture priorities, increase revenue, reduce operating costs, expand or reduce service delivery)

**4. What impact do these goals/priorities have on our workforce?** (Consider attrition/turnover, competition for talent, need for training or different skills)

**5. Are there plans for a reorganization or restructuring of workload?** (Consider mission-critical processes, right-sourcing opportunities, advances in technology)

**6. What service gaps will need to be addressed in the next 5 years?** (Consider staffing levels, equipment needs, technology, financial constraints)

**7. What feedback have we received from external stakeholders?** (May include other agencies, unions, oversight organizations, customers)

## PHASE 2 – ANALYSIS WORKSHEET

The following questions can be used in a department, division or workforce team discussion to analyze the current workforce situation before deciding on interventions and strategies to address needs.

**1. What workforce changes have occurred in the department / division in the past 5 years?** (Change in demographics, retirements, reductions in force, etc.)

**2. What will be the impact of these changes over the next few years?** (Skill gaps / institutional knowledge / leadership, etc.)

**3. What are the key positions in the department / division / work area that may be the most critical to fill?** (Leadership, mission-critical, “hard-to-fill”, etc.)

**4. For what positions might there be an oversupply in 5 years?**

**5. How might we create or revise work processes to alleviate workforce and staffing realities in 5 years?** (Automation, customer-driven processes, etc.)

### **PHASE 3 – ACTION WORKSHEET**

The following questions can be used in a department, division or workforce team discussion to decide on interventions that will address its workforce needs.

**1. What strategies could we implement NOW (small successes) to address identified gaps and workforce needs?**

**2. What strategies could we implement in the SHORT TERM (6-18 mos.) to address identified gaps and workforce needs?**

**3. What strategies could we implement LONG TERM (18 mos.-5 years) to address identified gaps and workforce needs?**

**4. Who will oversee the department or division's workforce planning efforts?**

**5. What else do we need to put in place to ensure success?**